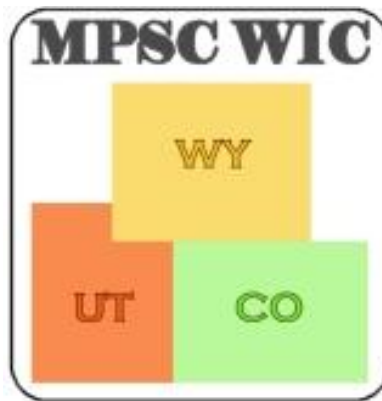

Mountain Plains States Consortium WIC System Project

DDI DELIVERABLE #07

SA 3 SYSTEM ADMINISTRATION OPERATIONS SCREENS DFDD

(DETAILED FUNCTIONAL DESIGN DOCUMENT)

Presented to:



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1 Non-Serialized Inventory Setup

This screen allows for the setup of non-serialized inventory categories, such as pamphlets, and their items. This defines the items that are available for use at the local agency or clinic level. For the system's non-serialized inventory ordering functions, inventory items should be marked as ordered through a state's distribution center. Categories should be marked as assignable to participant if they are expected to be available to the clinic service's breastfeeding equipment function.

> *Operations Administration > Non-Serialized Inventory Setup*

Non-Serialized Inventory Category Pamphlets 1 of 99 New Edit

Category Name Pamphlets Deactivate ☐

Sort Order 2

BF Related for Participants ☐

Add Row

Non-Serialized Category Items				
	Description	Sort Order	Order by State	Deactivate
>	Breastfeeding Basics 101	1	<input type="checkbox"/>	<input type="checkbox"/>
	Nutrition Education 101	2	<input type="checkbox"/>	<input type="checkbox"/>
	What is Peer Counseling?	3	<input type="checkbox"/>	<input type="checkbox"/>
	Advanced Breastfeeding	4	<input type="checkbox"/>	<input type="checkbox"/>

Control	Description			
New	Clicking the New command button allows the user to add a new non-serialized category inventory record.			
	Type	Command Button		
	Hot Key	Alt + N		
Edit	Clicking the Edit command button allows the user to edit the displayed non-serialized category inventory record.			
	Type	Command Button		
	Hot Key	Alt + T		
Non-Serialized Inventory Category	This is the record selector for the non-serialized inventory category records. It contains all non-serialized inventory category records. The drop-down and spin control allow selection of other non-serialized inventory category records.			
	Type	Record Selector		
	Contents	Category Name		
	DB Column	NonSerializedInventoryCategory table lookup		
Category Name	This is the category name of the non-serialized inventory items.			
	Type	Text Box		
	Required	Yes		
	Length	50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryCategory.Name		
Sort Order	This is the display sequence for the category name (within list boxes, etc.).			
	Type	Text Box		
	Required	Yes		
	Length	Integer 3		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryCategory.DisplaySeqNr		

Control	Description			
BF Related for Participants	Indicates whether the category contains breastfeeding related items that are assignable to participants by the clinic service’s breastfeeding equipment function.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryCategory.BFEquipmentIn		
Deactivate	This will deactivate the category. This affects whether it is available in the list box when selecting available categories to track against.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryCategory.Status		
Add Row	Clicking the Add Row command button creates a blank row in the grid for another inventory item to be entered in the grid.			
	Type	Command Button		
	Hot Key	Alt + A		
Non-Serialized Category Items	The items within the category selected.			
	Type	Data Grid		
	Display	No		
Non-Serialized Category Items - Description	The description of the item.			
	Type	Text Box		
	Required	Yes		
	Length	100		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryType.Description		

Control	Description			
Non-Serialized Category Items - Sort Order	The sort order used to determine the display sequence of the items when displayed in a list box.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 3		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryType.DisplaySeqNr		
Inventory Items – Order By State	Indicates the inventory item is not available.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryType.StateIn		
Non-Serialized Category Items - Deactivate	Indicates the item is not available for use within the system.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryType.Status		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of this non-serialized inventory category or related item record is displayed.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	Mask of 'firstname lastname mm/dd/yyyy'		
	Display Only	Yes	Calculated	No
	DB Column	Most recent of NonSerializedInventoryCategory.ModifyStfpID+SerializedInventoryCategory.ModifyDt NonSerializedInventoryType.ModifyStfpID+Seri alizedInventoryType.ModifyDt		

Business Rules

1. Display an error message when the category name is not unique.
2. Display an error message when the item description within a category is not unique.
3. If the Category is marked deactivated then mark all Items as deactivated.
4. If the Category is marked deactivated then all fields and the Item grid become Read Only except the deactivate checkbox.

Developer Notes

1. For implementation, a non-serialized inventory category of 'Pamphlets' must be set up for the CS Nutrition Education Topics and Pamphlets functionality.

2 Serialized Inventory Setup

This screen allows for the setup of serialized inventory items. Categories should be marked as assignable to participant if they are expected to be available to the clinic service's breastfeeding equipment function.

> *Operations Administration > Serialized Inventory Setup*

Serialized Inventory Category Breastpumps < 1 of 99 > New Edit

Category Name Breastpumps

Sort Order 1

BF Related to Participants ☒

Deactivate ☐

Add Row

Serialized Inventory Types			
	Description	Sort Order	Deactivate
>	Medela Latina	3	<input type="checkbox"/>
	Medela Symphony	2	<input type="checkbox"/>
	Hollister Ameda Elite	1	<input type="checkbox"/>
	Medela Type E-D	4	<input type="checkbox"/>

Control	Description			
New	Clicking the New command button allows the user to add a new serialized inventory category record.			
	Type	Command Button		
	Hot Key	Alt + N		
Edit	Clicking the Edit command button allows the user to edit the displayed serialized inventory category record.			
	Type	Command Button		
	Hot Key	Alt + T		
Serialized Inventory Category	This is the record selector for the serialized inventory category records. It contains all serialized inventory category records. The drop-down and spin control allow selection of other serialized inventory category records.			
	Type	Record Selector		
	Contents	Category Name		
	DB Column	SerializedInventoryCategory table lookup		
Category Name	This is the category name of the serialized inventory items.			
	Type	Text Box		
	Required	Yes		
	Length	50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	SerializedInventoryCategory.Name		
Sort Order	This is the display sequence for the category name (within list boxes, etc.).			
	Type	Text Box		
	Required	Yes		
	Length	Integer 3		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	SerializedInventoryCategory.DisplaySeqNr		
BF Related for Participants	Indicates whether the category contains breastfeeding related items that are assignable to participants by the clinic service's breastfeeding equipment function.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	SerializedInventoryCategory.BFEquipmentIn		

Control	Description			
Deactivate	This will deactivate the category. This affects whether it is available in the list box when selecting available categories to track against.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	SerializedInventoryCategory.Status		
Add Row	Clicking the Add Row command button creates a blank row in the grid for another inventory type to be entered in the grid.			
	Type	Command Button		
	Hot Key	Alt + A		
Serialized Inventory Types	The serialized inventory types within the category selected.			
	Type	Data Grid		
	Display	No		
Serialized Inventory Types – Description	The description of the inventory type.			
	Type	Text Box		
	Required	Yes		
	Length	50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	SerializedInventoryType.Description		
Serialized Inventory Types - Sort Order	The display sequence number used to determine the display sequence of the type of item when displayed in a list box.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 4		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	SerializedInventoryType.DisplaySeqNr		
Serialized Inventory Types - Deactivate	Indicates the category type is not active.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	SerializedInventoryType.Status		

Control	Description		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of this serialized inventory category or related item record is displayed.		
	Type	Text Box	
	Required	No	
	Length	NA	
	Validation	Mask of 'firstname lastname mm/dd/yyyy'	
	Display Only	Yes	Calculated No
	DB Column	Most recent of SerializedInventoryCategory.ModifyStfpID+SerializedInventoryCategory.ModifyDt SerializedInventoryType.ModifyStfpID+SerializedInventoryType.ModifyDt	

Business Rules

1. Display error if category is not unique.
2. Display error if descriptions are not unique within a category.
5. If the Category is marked deactivated then mark all Types as deactivated.
3. If the Category is marked deactivated then all fields and the Type grid become Read Only except the deactivate checkbox.

Developer Notes

- 1.

3 Staff Setup

These screens allow the setup of competencies and time study activities for the state defined staff type. Time study activities that are non-scheduled can be indicated to allow for subsequent reporting on these activities.

Time Study Activities grid is Pending ESC Approval / Funding.

> *Operations Administration* > *Staff Setup*

Staff Type: Para Professional ▼

Add Row

Competencies			
	Skill	Description	Deactivate
>	Blood Measurements	Ability to take blood measurements	<input type="checkbox"/>
	Interpersonal	Interpersonal dynamics	<input type="checkbox"/>
	Interviewing	Interviewing tools and techniques	<input type="checkbox"/>

Add Row

Time Study Activities					
	Short Description	Long Description	Cost Category	Non Sch Act	Deactivate
>	BF - Communications	Specific discussions concerning breastfeeding	Client Services ▼	<input type="checkbox"/>	<input type="checkbox"/>
	CS - Communications	Phone Calls, etc.	Breastfeeding	<input type="checkbox"/>	<input type="checkbox"/>
	Computer Problems	Anything related to computer malfunctions	Client Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Control	Description			
Staff Type	This is the state defined staff types			
	Type	List Box		
	Required	Yes		
	DB Column	Competency.StaffTypeCd + TimeStudyActivity.StaffTypeCd		
	Code ID	Staff Type Cd		
Add Row	Clicking the Add Row command button creates a new row in the data grid allowing the user to add another competency for the staff type.			
	Type	Command Button		
	Hot Key	None		
Competencies	The data grid is used to define the competencies for the staff type.			
	Type	Data Grid		
Skill	This is the skill of the competency. This will be shown in the list box where competencies are assigned to user.			
	Type	Text Box		
	Required	Yes		
	Length	40		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	CompetencyType.Title		
Description	This is the description of the competency. This is for informational purposes only.			
	Type	Text Box		
	Required	No		
	Length	60		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	CompetencyType.Description		
Deactivate	This will deactivate the competency. This affects whether it is available in the list box when selecting available competencies to track against.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	CompetencyType.Status		

Control	Description			
Time Study Activities	The data grid is used to define the activities for the staff type.			
	Type	Data Grid		
Add Row	Clicking the Add Row command button creates a new row in the data grid allowing the user to add another activity for the staff type.			
	Type	Command Button		
	Hot Key	None		
Short Description	The short description of the activity. This is used for the time study entry list box selection.			
	Type	Text Box		
	Required	Yes		
	Length	40		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	TimeStudyActivityType.ShortDescription		
Long Description	This is the long description of the activity. It is used for reference when a longer explanation is needed to describe the short description.			
	Type	Text Box		
	Required	No		
	Length	100		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	TimeStudyActivityType.LongDescription		
Cost Category	This is the cost category.			
	Type	List Box		
	Required	Yes		
	DB Column	TimeStudyActivityType.CostCategoryCd		
	Code ID	Cost Category This code element is non-editable. The installed values are: Client Services Nutrition Education Breastfeeding Administration		

Control	Description			
Non Sch Act	This indicates that this activity is a non scheduled activity. When time study entries occur, a report is available to count and accumulate the associated time. This can be used to find out where non scheduled time is occurring.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	TimeStudyActivityType.NonSchActIn		
Deactivate	This will deactivate the activity. This affects whether it is available in the list box when selecting activities in the time study data entry screen.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	TimeStudyActivityType.status		

Business Rules

1. Error if the Title (competency) is not unique within staff type.
2. Sort Competencies by Title
3. Error if the Short Description (time study activity) is not unique within staff type.
4. Sort Time Study Activities by Short Description.

Developer Notes

- 1.

4 Time Study Setup

This screen allows the setup of the time studies. Time studies are normally conducted for one week each month or for one month every quarter.

Time Study Setup is Pending ESC Approval / Funding.

> *Operations Administration > Time Study Setup*

Time Study Period

Start Date Deactivate ☐

End Date

Deadline for Submissions

FTE Definition

Local Agency

Control	Description			
New	Clicking the New command button allows the entry of a new time study. All fields are cleared and the cursor is on the Start Date field.			
	Type	Command Button		
	Hot Key	Alt + N		
Edit	Clicking the Edit command button allows the fields to be editable.			
	Type	Command Button		
	Hot Key	Alt + T		
Time Study Period	This is the record selector for the time study records. It contains the time study dates (Start and End Dates) with the local agency number. The drop-down and spin control allow selection of historical records.			
	Type	Record Selector (using Date Picker). This is a non-editable record.		
	Contents	Formatted dates of "mm/dd/yyyy" – "mm/dd/yyyy" with the local agency number.		
	DB Column	TimeStudy.StartDt + TimeStudy.EndDt +TimeStudy.LA_ID		
Deactivate	A checkbox used to indicate that the time study is deactivated.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	TimeStudy.Status		
Start Date	This is the start date of the time study.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	TimeStudy.StartDt		
End Date	This is the end date of the time study.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	TimeStudy.EndDt		

Control	Description			
Deadline for Submissions	This is the deadline for staff to enter their activities during a time study.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	TimeStudy.SubmissionDeadlineDt		
FTE Definition	This is the FTE Definition used for time study report calculations (i.e. 41.1 for weekly time studies; 173.2 for monthly time studies).			
	Type	Text Box		
	Required	Yes		
	Length	Decimal 4,1		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	TimeStudy.FTEDefinitionNr		
Local Agency	The Local Agency participating in the time study. Blank implies a statewide time study.			
	Type	List Box		
	Required	No		
	DB Column	TimeStudy.LA_ID		
	Code ID	LocalAgency table lookup		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of this time study record is displayed.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	Mask of 'firstname lastname mm/dd/yyyy'		
	Display Only	Yes	Calculated	No
	DB Column	TimeStudy.ModifyStfpID + TimeStudy.ModifyDt		

Business Rules

1. Edit is disabled for any time study where any activity has logged against the time study.
2. Time Study Period record selector is sorted by end date, descending.
3. Display time study records whose start dates are within the last three years.
4. Display an error message when the time study dates overlap within the selected local

Business Rules

agency within the last three years.

5. Display an error if the End date is before (less than) the Start date.
6. Display an error if the Deadline for Submissions is before (less than) the End Date

Developer Notes

- 1.